



AEGIS MOBILE ACCESS

All content in this help system, as well as all content in our products and on www.aegispremier.com are Copyright © 2024 Aegis Premier Solutions. All Rights Reserved. Aegis Premier Solutions and logos are trademarked and protected by Aegis Premier Solutions.

Table of Contents

Objectives	1
Aegis Mobile Application Overview	2
Logging In	3
Partners (Donors)	6
Core Info Area	9
Button Bar	10
Contact Area	14
Sectional Menu	15
Appeals	21
Major Donors	26

Objectives

The purpose of this manual is to instruct users on understanding the:

- **Function of Aegis Mobile Access**
- **How the CRM displays in the Mobile Access**
- **How the Partners/Donors display in the Mobile Access**
- **How the Appeals display in the Mobile Access**
- **How the Major Donors display in the Mobile Access**

Aegis Mobile Access Overview

This manual is for the understanding of how to use **Aegis Mobile Access**.

The Aegis Mobile App is a quick access, mobile application that can be utilized from a phone, tablet, or other mobile device. It is accessible via the internet from the device and can be bookmarked for easy access.

There are four major modules that are currently published to Aegis Mobile Access – all other modules not listed are still under development.

The four modules that are currently accessible are:

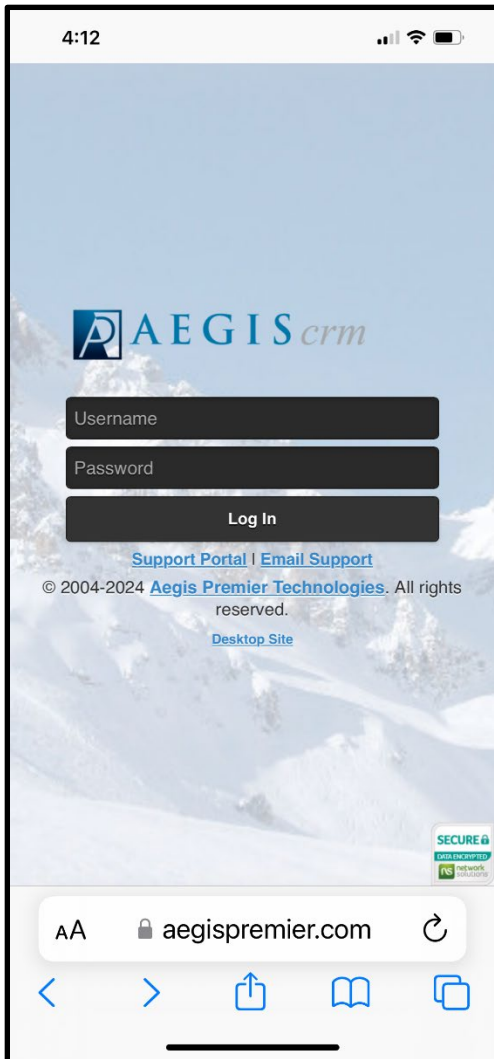
- Aegis CRM landing page
- Donors/Partners
- Appeals
- Major Donors

As of this publication, **only Notes are able to be added as new records** from the mobile device. All other records are **READ ONLY** but enable very effective access to most major information.

Logging In

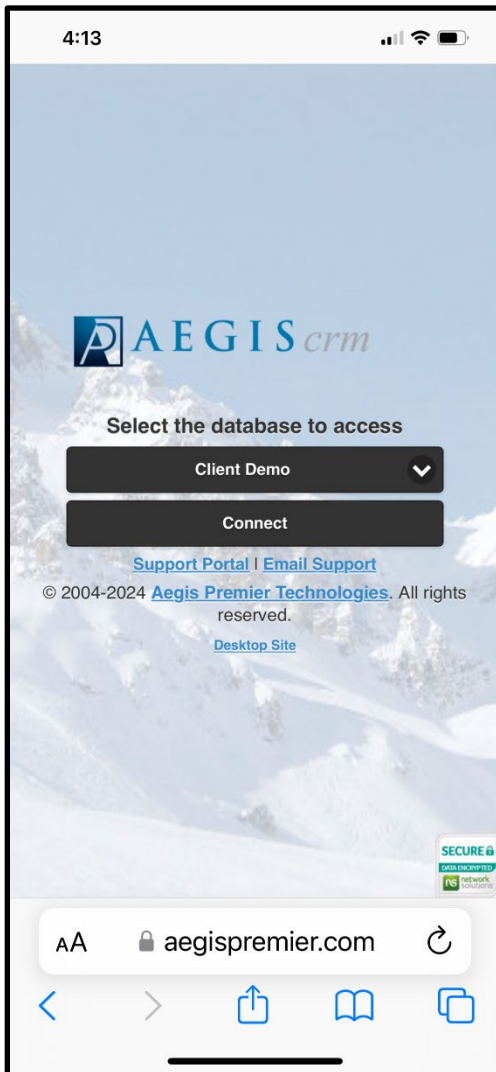
User should follow the directions below to log in to Aegis Mobile Access.

1. Access the internet from the desired Mobile Device.
 - Open a Browser from the mobile device (Safari, Bing, Google, etc.) - Aegis Mobile Access is NOT a phone app – so users do not go to an App Store to download.
 - The application IS designed for phone and devices however and will re-size to the device's screen.
2. In the Browser, type in and access <https://m.aegispremier.com/Account/Login>



3. Enter the Username and Password.
 - These are the same credentials used when accessing the Aegis Desktop application OR Rapid Entry.

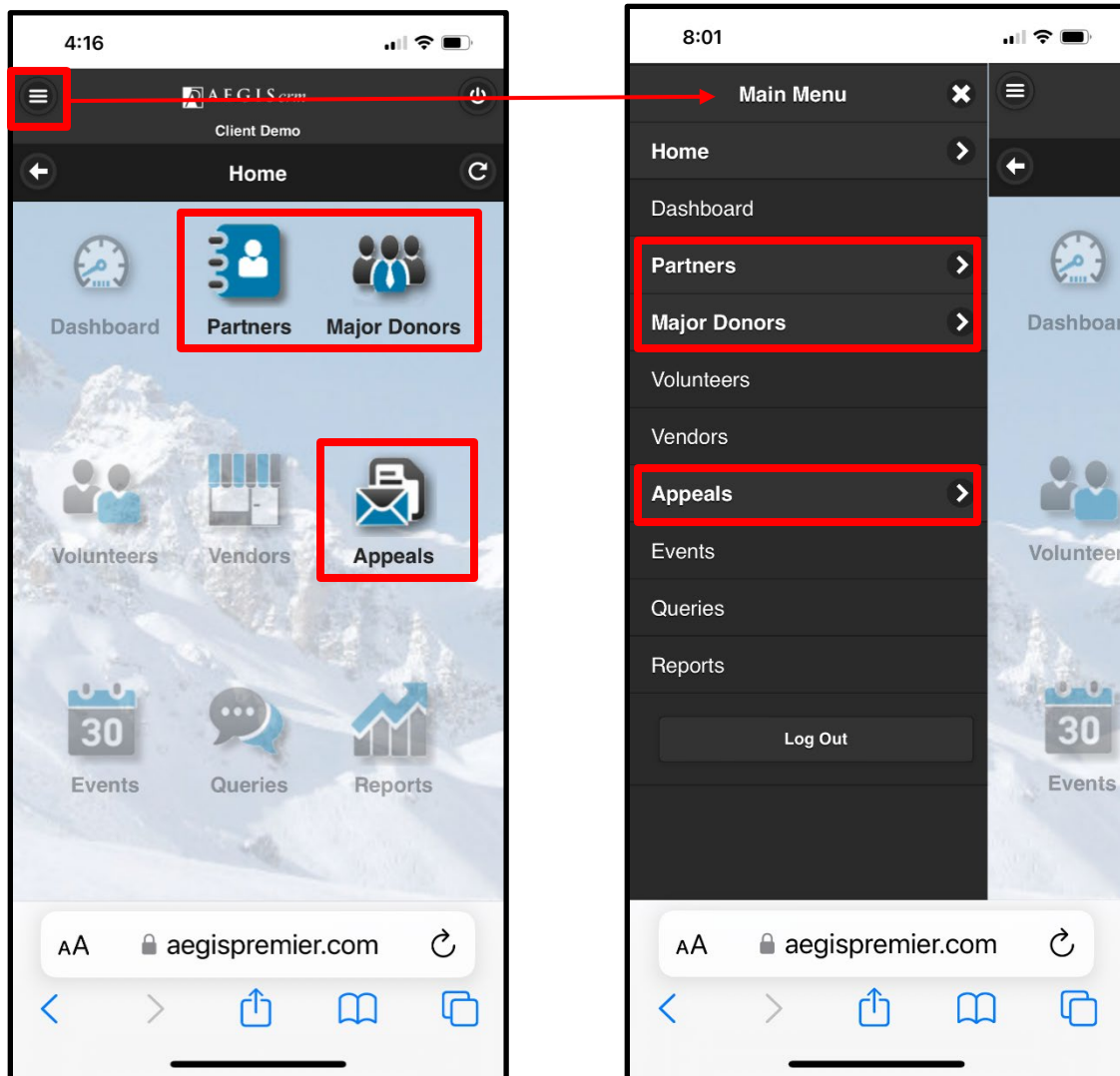
4. **IF users **HAVE** multiple Database access**, the following screen displays, in which case users should choose the desired Database from the dropdown and click **Connect**.
5. **IF users do **NOT HAVE** multiple Database access**, the screen on the next page displays.



6. The **Mobile Aegis CRM Landing Page** displays.

7. Users can navigate to **Partners, Major Donors, or Appeals**.

- All other listed areas are under development and are grayed out.



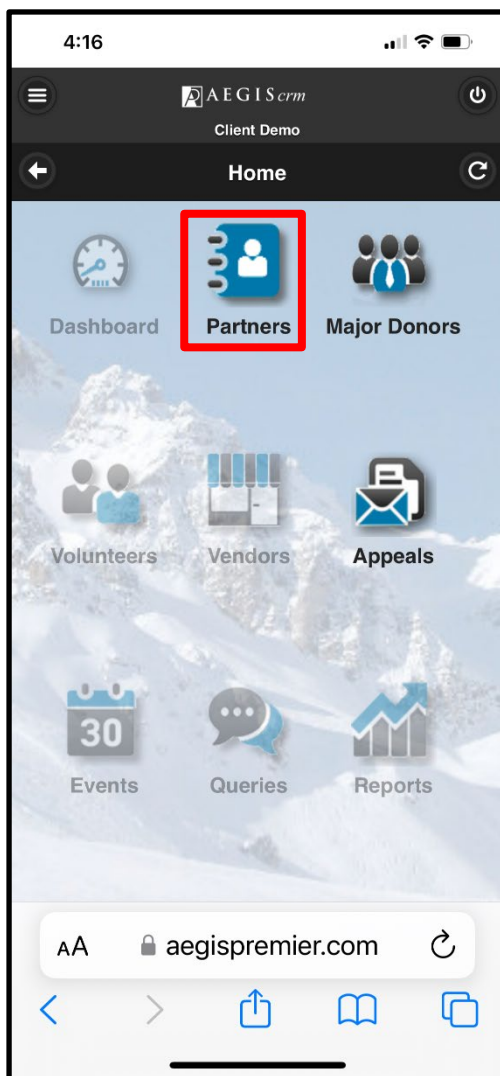
8. Users can also navigate from the upper left-hand hamburger menu from any module in the system.

Partners (Donors)

Users can view considerable amounts of Partners (Donors/Constituents) information from their mobile device.

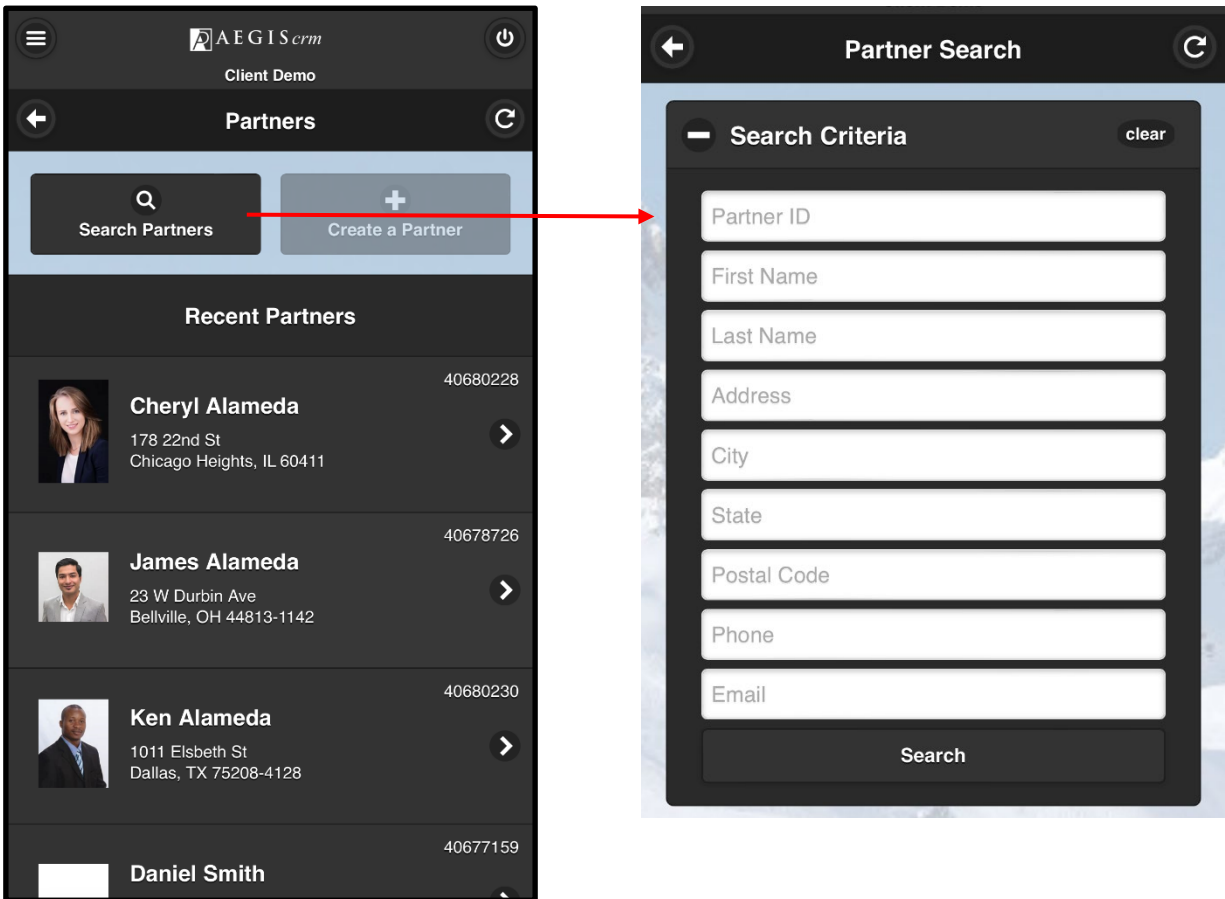
There is, however, a limited amount of interactivity enabled at this moment with only the ability to add a new Note to a Donor record permitted.

1. From the **Mobile Aegis CRM Landing Page**, click on the **Partners** icon.



2. The **Partners** landing page displays.

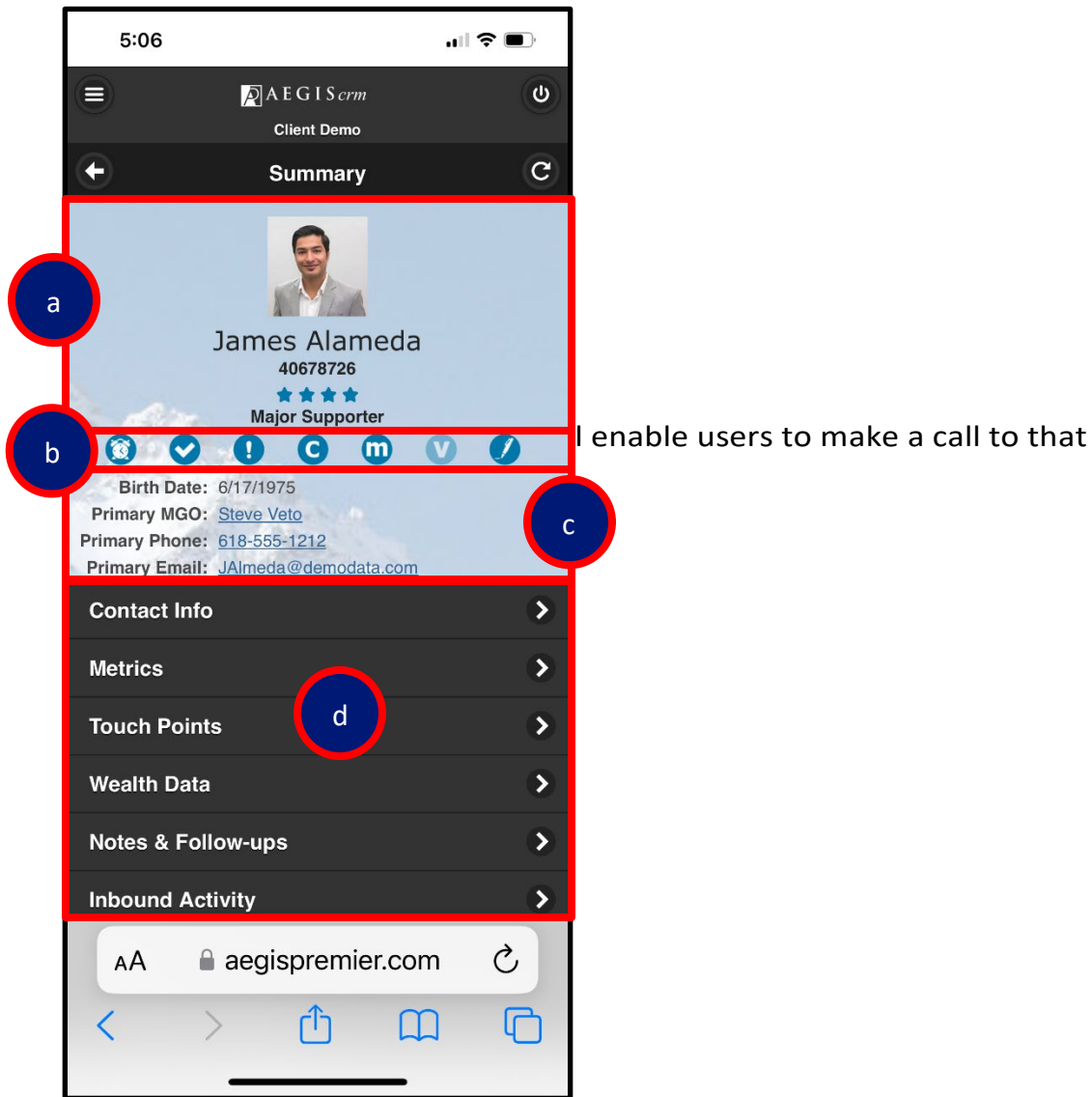
- **+Create a Partner** button is NOT available at this time and is greyed out.



3. Users can Search for a Partner by clicking on the Search Partners button and filling out one or more of the desired search fields.

4. Users can also access **Recent Partners** from the listing below by clicking on the desired record.

5. Clicking on the tile for **James Almeda** displays his mobile record.



enable users to make a call to that

6. Users have four main areas in which they can interact with the record:

a Core Info Area

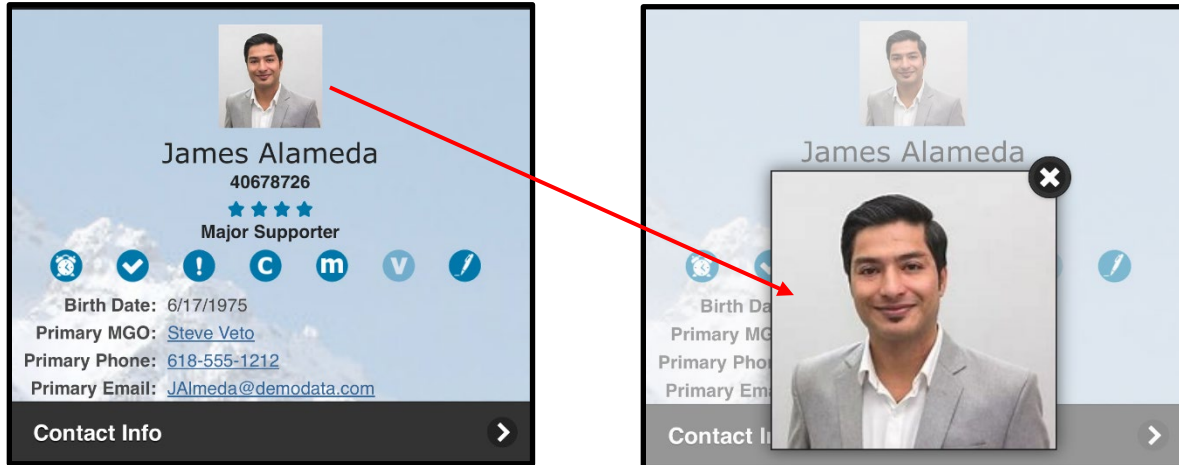
b Button Bar

c Contact Area

d Sectional Menu

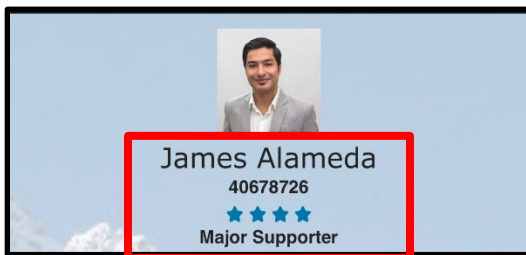
Core Info Area

1. From the **Core Info** area, users can tap the record image and expand to view in a larger format.



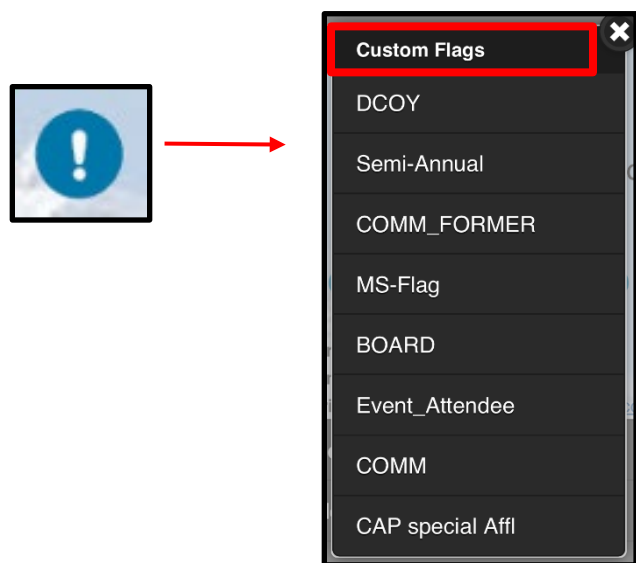
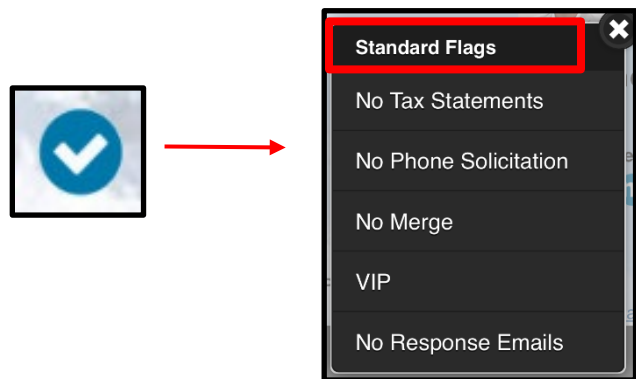
2. Immediately below the Partner/Donor picture is 4 major pieces of static info:

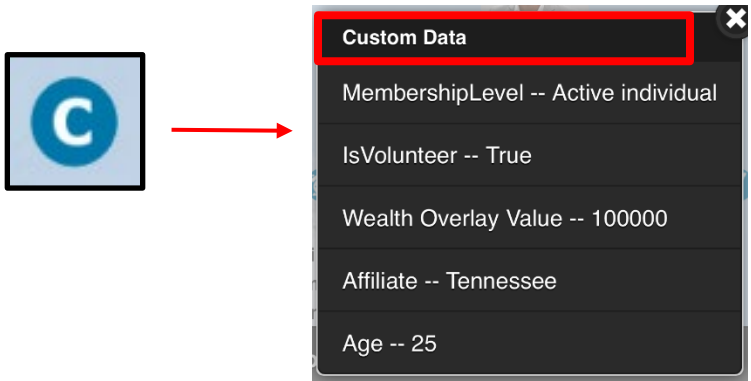
- **Donor Name** (James Alameda)
- **Donor ID** (40678726)
- **Major Donor Star Ranking**
- **Major Donor Grouping Label**



Button Bar

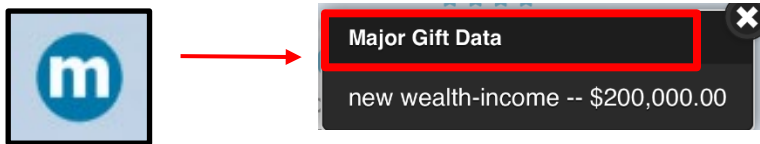
1. Below the image is the **Button Bar** menu – this area enable the user to view the following donor specific sub-menu's by tapping on them.
 - The grayed out Vendor icon is unavailable.





A square icon with a blue circle containing a white letter 'C' is connected by a red arrow to a dark grey panel titled 'Custom Data'. The panel has a red border around its title bar and a close button in the top right corner. The data listed in the panel is:

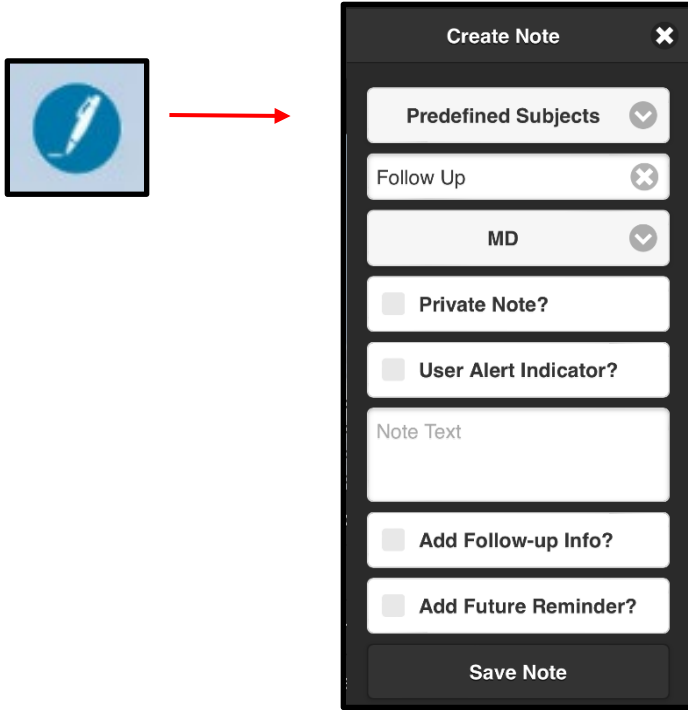
- MembershipLevel -- Active individual
- IsVolunteer -- True
- Wealth Overlay Value -- 100000
- Affiliate -- Tennessee
- Age -- 25



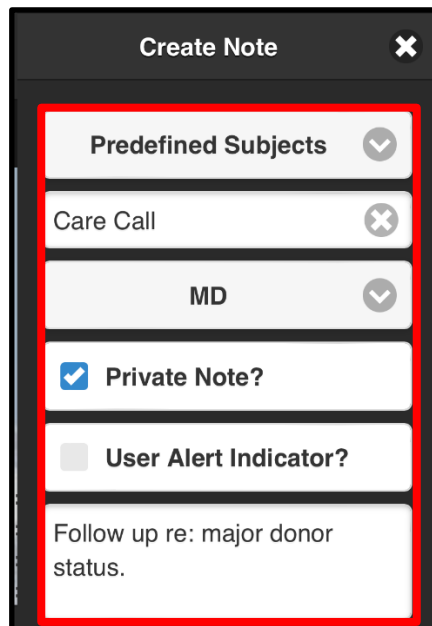
A square icon with a blue circle containing a white letter 'm' is connected by a red arrow to a dark grey panel titled 'Major Gift Data'. The panel has a red border around its title bar and a close button in the top right corner. The data listed in the panel is:

- new wealth-income -- \$200,000.00

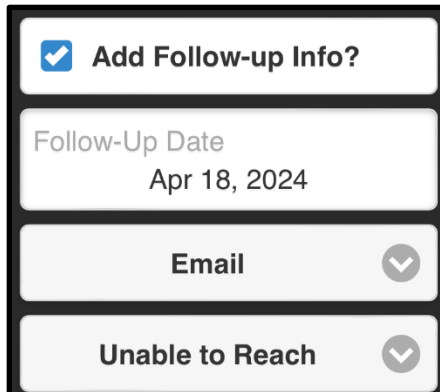
- The last Drill Down menu option is the ability to **Create a new Note**.
 - IMPORTANT:** IF users have voice activation enabled on their phone, they can actually dictate the note details and create a Note record.



- As the user fills out the note, they are provided the option of completing the usual dropdowns and check boxes, so of which are conditional.
- For the **Basic** note info: users select the:

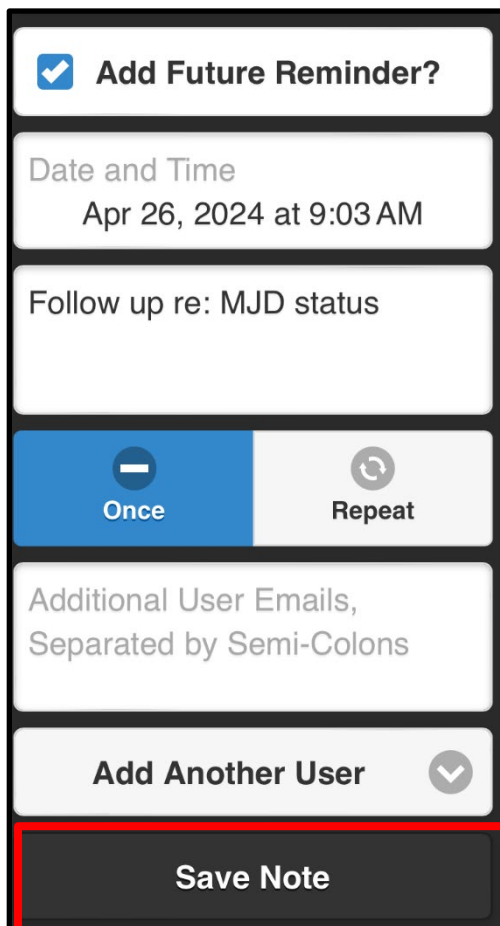


5. For the **Optional Follow up** info, users can select the:



A screenshot of a mobile application form titled "Add Follow-up Info?". The form has a white background with a black border. At the top, there is a checkbox with a blue checkmark and the text "Add Follow-up Info?". Below this is a text input field labeled "Follow-Up Date" containing the text "Apr 18, 2024". Underneath the date field are two dropdown menus. The first dropdown is labeled "Email" and the second is labeled "Unable to Reach". Both dropdowns have a downward-pointing chevron icon.

6. Users can then decide if they want to **Add Future Reminder** info.



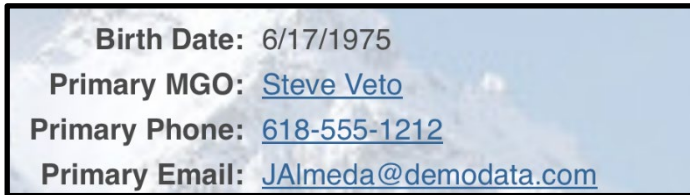
A screenshot of a mobile application form titled "Add Future Reminder?". The form has a white background with a black border. At the top, there is a checkbox with a blue checkmark and the text "Add Future Reminder?". Below this is a text input field labeled "Date and Time" containing the text "Apr 26, 2024 at 9:03 AM". Underneath the date field is a text input field labeled "Follow up re: MJD status". Below the text field are two buttons: "Once" (with a minus sign icon) and "Repeat" (with a circular arrow icon). Underneath the buttons is a text input field labeled "Additional User Emails, Separated by Semi-Colons". Below this field is a dropdown menu labeled "Add Another User" with a downward-pointing chevron icon. At the bottom of the form is a dark grey button labeled "Save Note", which is highlighted with a red border.

7. Once users have recorded all the desired info, they can click **Save Note**.

- This Note will be saved as a part of the permanent Donors record in the Aegis Desktop CRM.

Contact Area

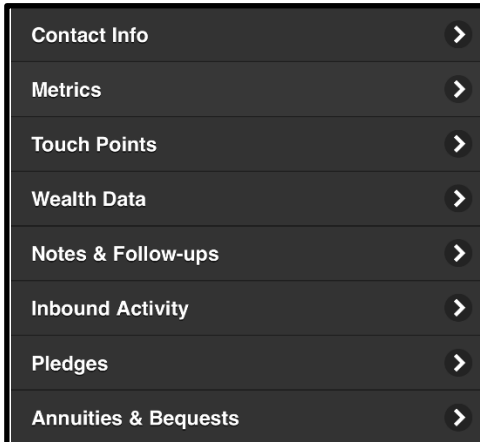
1. Below the **Drill Down** menu is the **Contact** area.



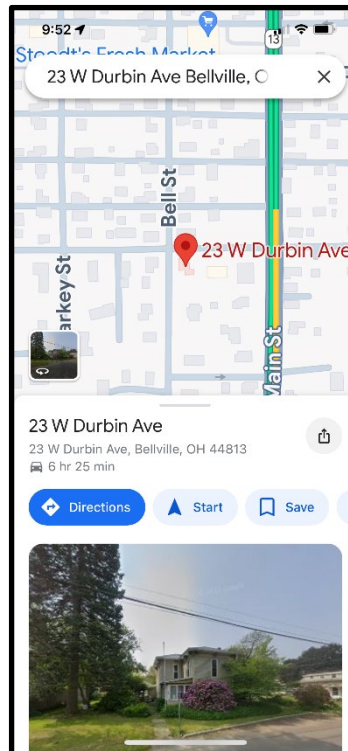
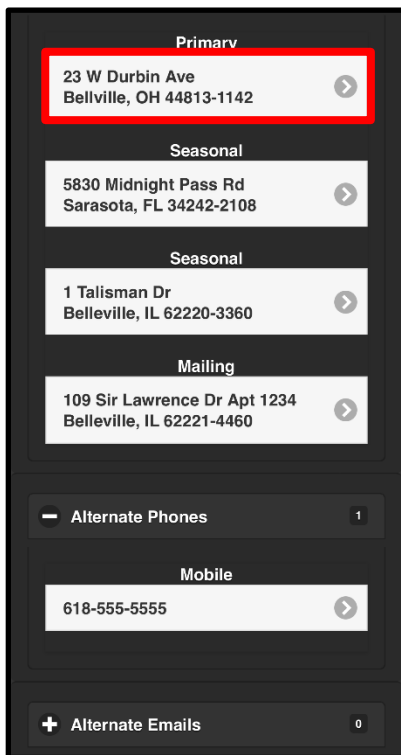
- **Birth Date** – Lists the Donors birth date.
- **Primary MGO** - Lists the Major Gift Officer.
 - If there is a secondary officer, users can tap on the primary name and the secondary will display.
- **Primary Phone** – If tapped, enable users to make a call to that number.
- **Primary Email** – If tapped enables users to email the Donor.

Sectional Menu

1. The **Sectional Menu** is the last section of the Partner/Donor record and contains several areas of critical information about the Donor.

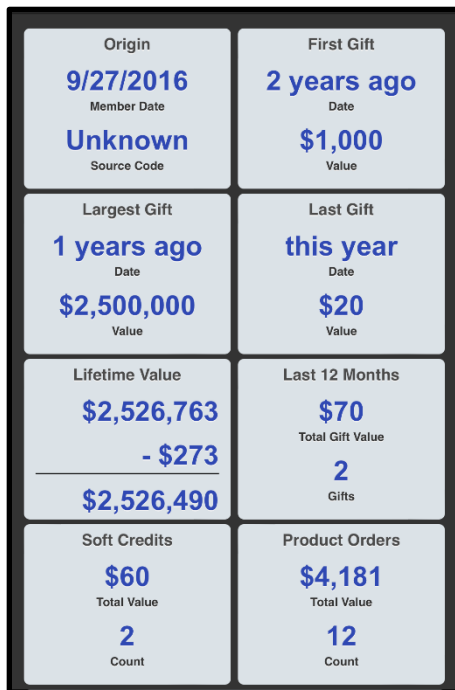


2. Expanding the **Contact Info** section enables users to see four different types of addresses which when clicked on will take the user to a Google Map display of its exact location.

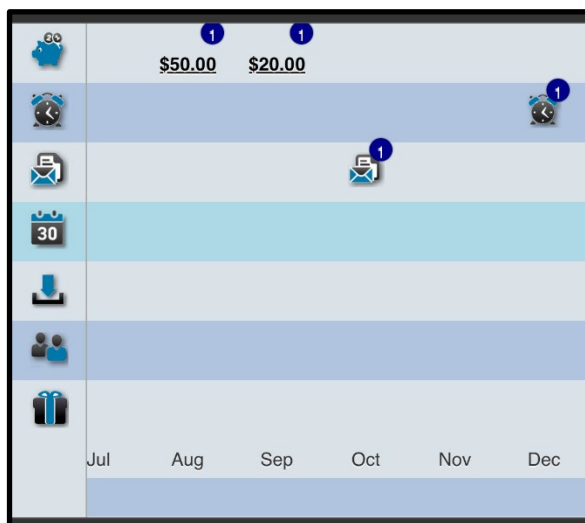


- Users can also view **Alternate Phones** and **Email** which clicking on will enables users to Call and Email via those entries.

3. Expanding the **Contact Info** section enables users to graphics relating 8 different tiles worth of data that comes from their main Donor **Activity** data.

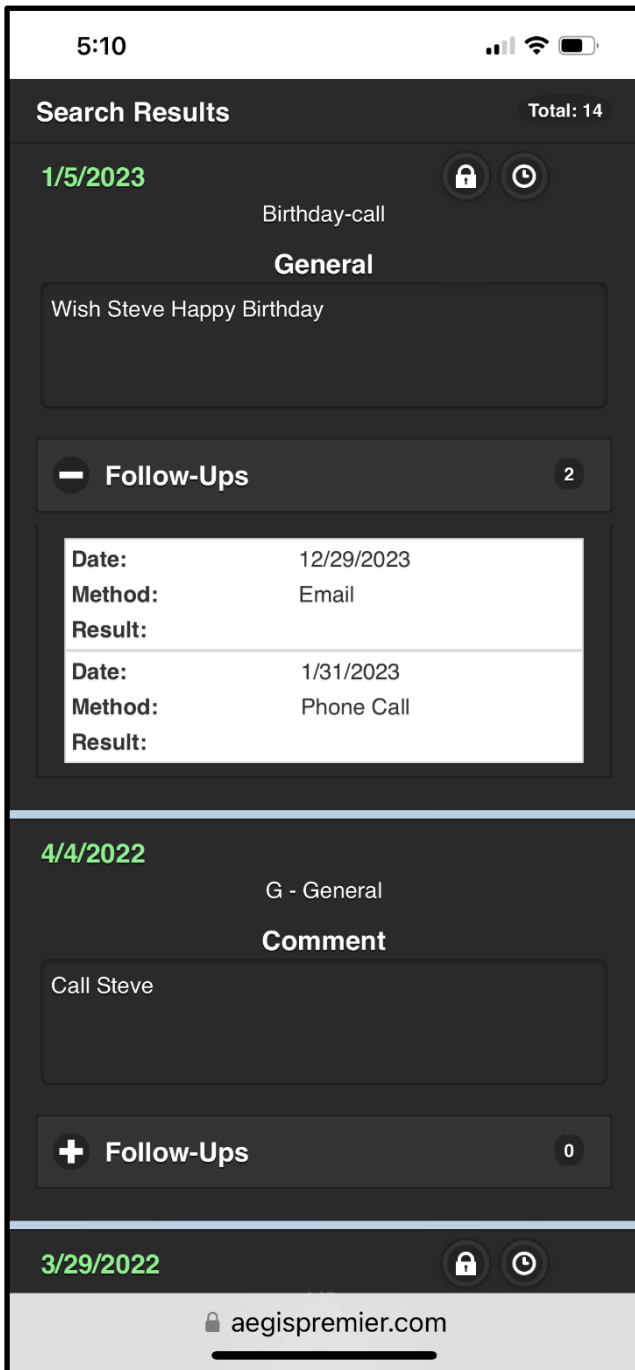


4. The **Touch Points** menu displays the latest CRM Desktop Touchpoints screen, but unlike the desktop version, the mobile is **NOT** interactive.



5. The **Wealth Data** sectional option is NOT available at this time.

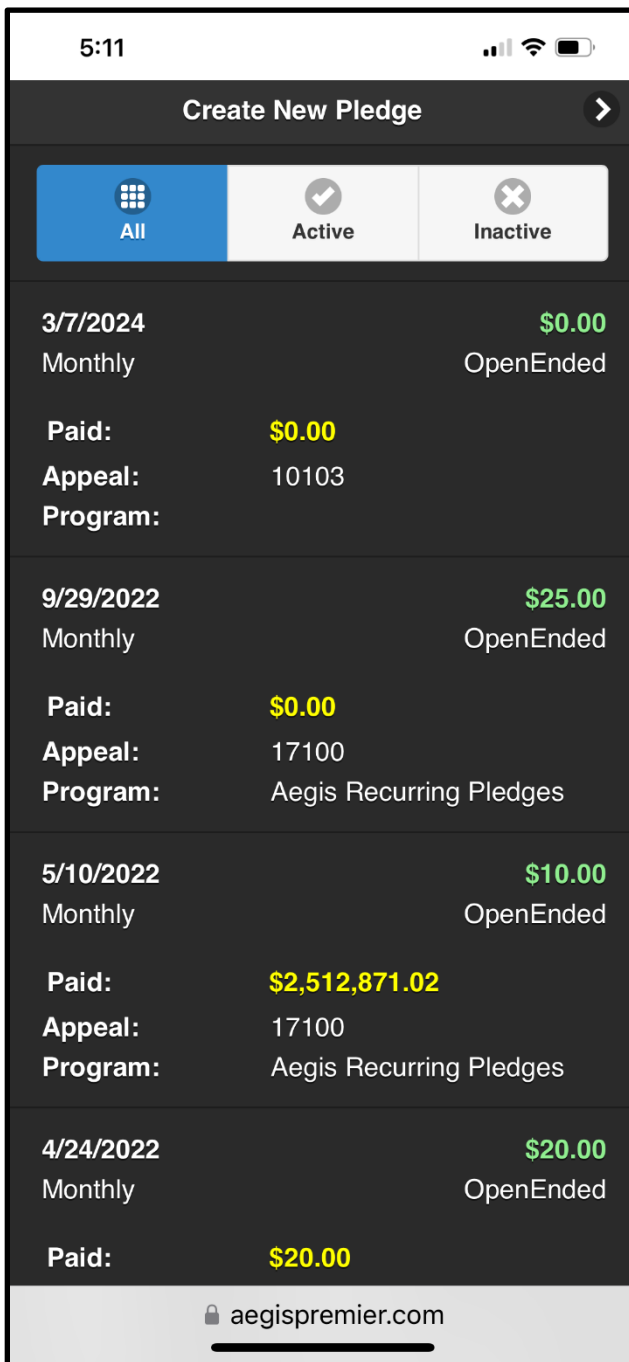
6. The **Notes and Follow Ups** section displays all the Donors notes and follow up messages in a scrolling list.
- Users can expand to see note follow ups. Users CANNOT create notes from here, but they can Search for them using the top search bar.



7. The **Inbound Activity** section displays ALL incoming activity: Contributions, Orders, Mailings, Split Transactions, Contacts, Gift in Kind, etc.
- It is NOT expandable at this moment – there is an expand icon in upper right corner, but the system will present an error message if clicked.
 - Users can search for particular Activity if desired.

+ Search Criteria		clear
Search Results		Total: 83
9/6/2023	\$20.00	
Contribution		>
Appeal: 17100		
Name: 2017 Spring mailing		
8/20/2023	\$50.00	
Split Transaction		>
Appeal: 17100		
Name: 2017 Spring mailing		
5/4/2023	\$0.00	
Appeal: 17100		>
Name: 2017 Spring mailing		
1/5/2023	(\$10.00)	
- REFUND		>
Appeal: 13MGCOPH		
Name: Denver Donor Event 7-13-2013		
12/30/2022	\$0.00	
Major Donor Contact		
Appeal: CMG13		

8. The **Inbound Activity** section displays ALL incoming pledges per Donor.
- Users can choose to display All, Active, or Inactive Pledges.



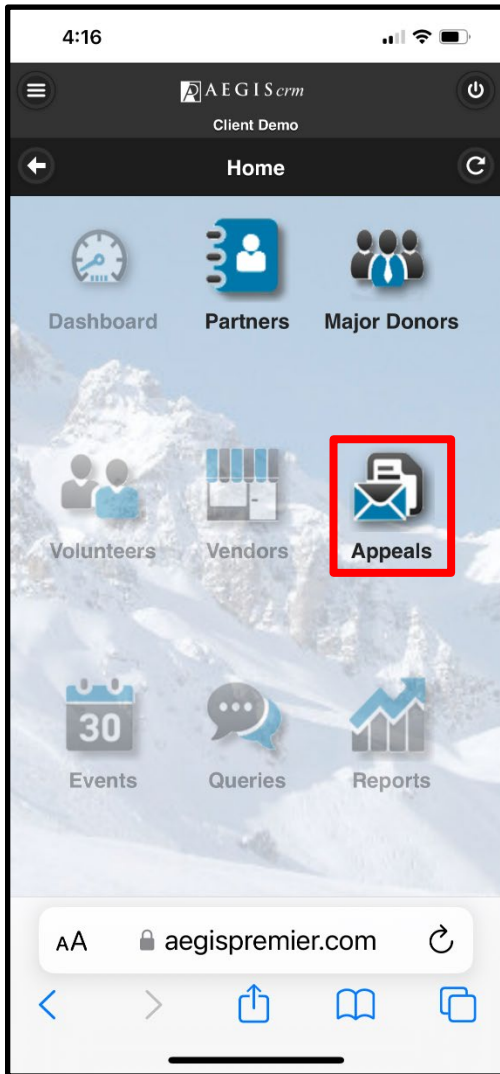
9. The **Bequests & Annuities** section displays ALL incoming bequests per Donor.
- Users can choose to display All, Active, or Inactive Pledges.

— Bequests			
Bequest ID	123434	Originator	
Type	Trust	Source	
Total Amount	\$0.00	Amount Paid	\$10,000.00
Paid in Full	False		
Bequest ID	1234	Originator	Steve Veto
Type		Source	
Total Amount	\$0.00	Amount Paid	\$0.00
Paid in Full	False		

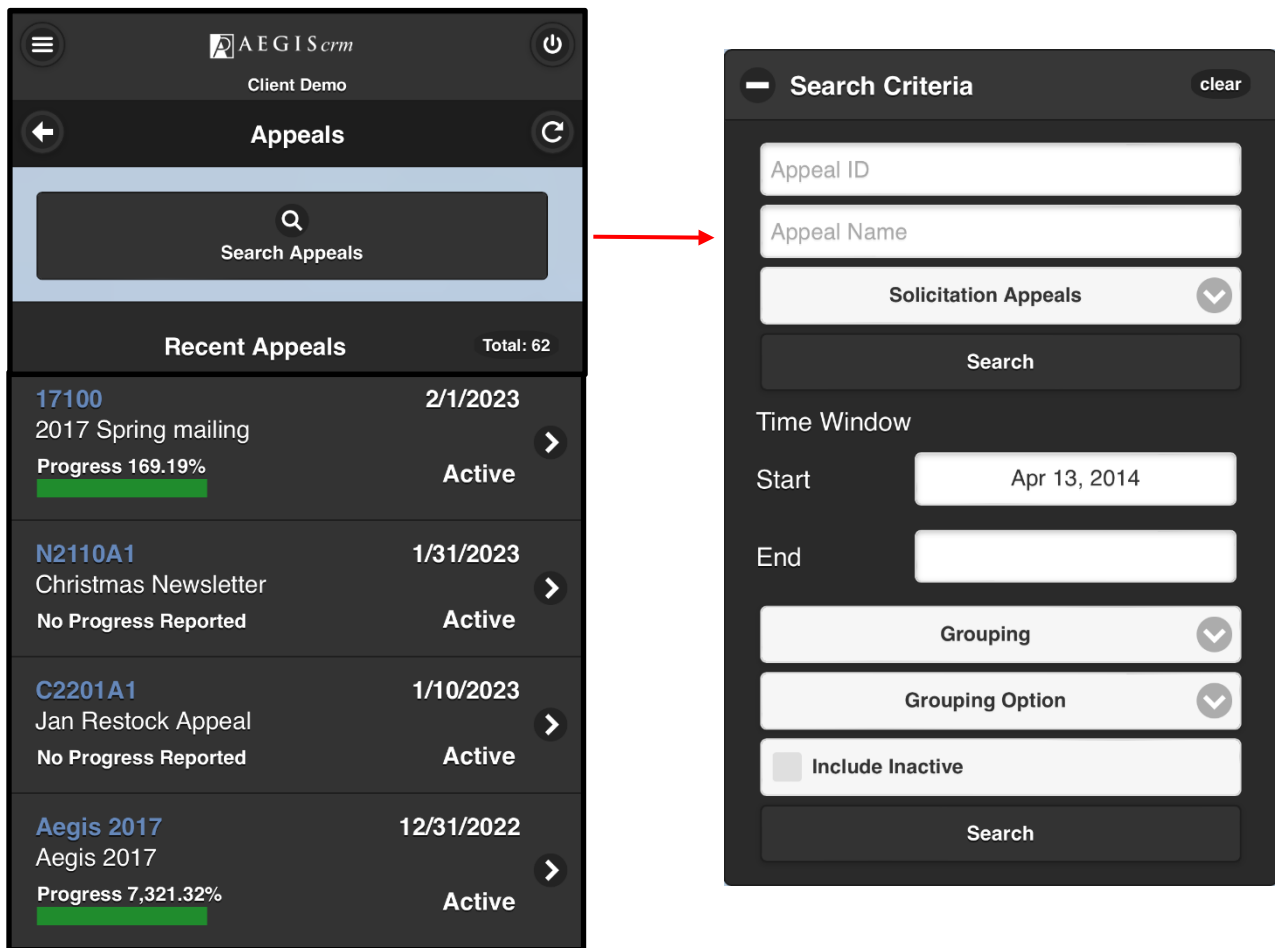
Appeals

Users can view consolidated Appeals summary information from the Appeals area.. The Appeals section is view only with no interactive functions permitted at this time.

1. From the **Mobile Aegis CRM Landing Page**, click on the **Appeals** icon.

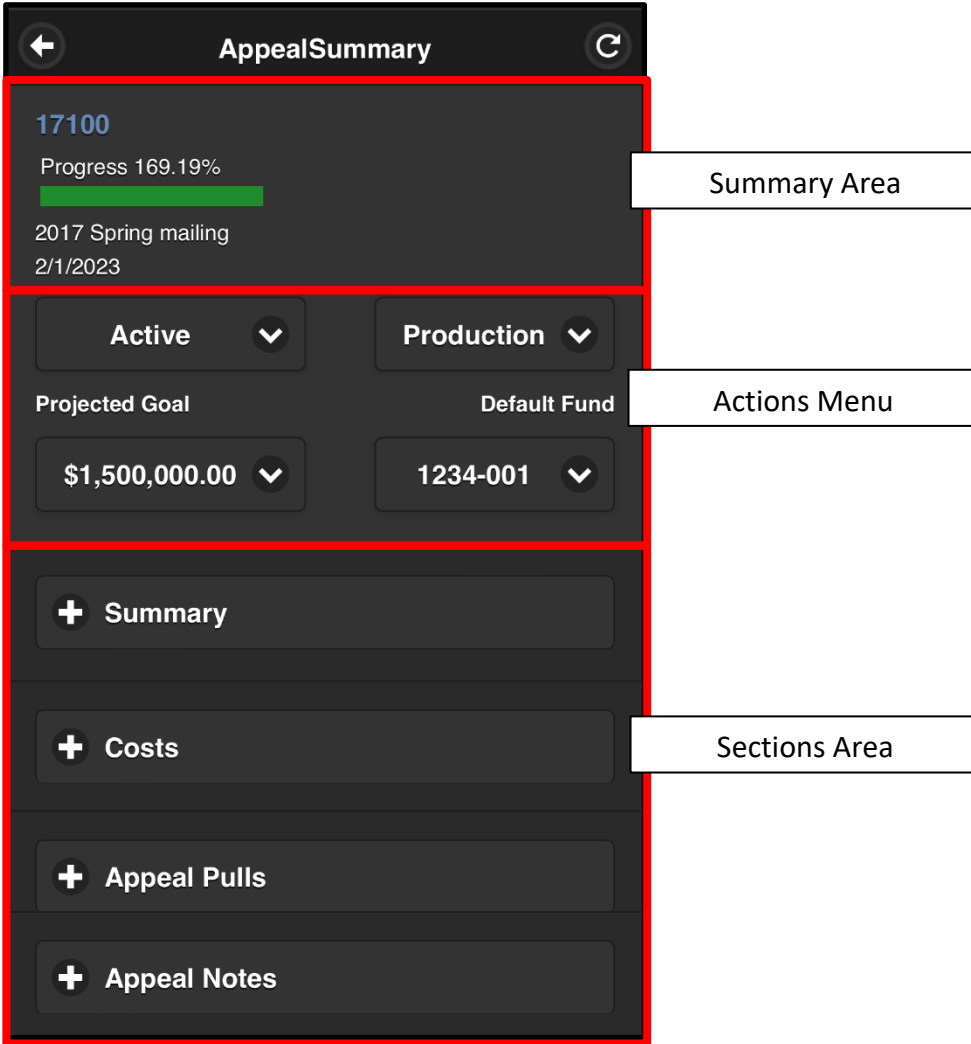


2. The **Appeals** landing page displays.
- Users can see the most Recent Appeals.



3. Users can also **Search** for a specific Appeal by tapping the Search Appeals area.

4. Clicking on an Appeal displays the **Appeal Summary** screen. Users view/interact with Appeal info from three distinct sections: The **Summary** area at the top, the **Actions** menu in the middle, and the **Sections** area at bottom.



5. The **Summary** area provides an overview of the Appeal: its **Progress %** against the Projected Goal, its **Full Name**, and The **Mail Date**.
6. From the **Actions** Menu users can take the following actions:
- **Active** – Can change the Appeal to **Inactive** as desired.
 - **Production** – Can change the Appeal to **Non-Production** as desired.
 - **Projected Goal** – Can edit the **Projected Goal** amount as desired.
 - **Default Fund** – Can change the **Default Fund** code as desired.

7. The Sections area enables users to drill into Four major areas: **Summary**, **Costs**, **Appeal Pulls**, and **Appeal Notes**.

- **Summary** – Displays the information contained in the Aegis Desktop, Appeal Record Activity Summary and summarizes the overall response rate and effectiveness of the Appeal.

Summary		
Number Sent	Responses	Response Rate
19053	107	0.56%
Date of Last Resp	Avg Response Value	
9/7/2023	\$23,718.09	
Gross Revenue: \$2,537,835.99		
Avg per Piece Cost	Avg Package Cost	
\$0.62	N/A	
Fixed Costs	Segment Cost	Package Cost
\$1,850.00	\$3,691.29	
Total Cost \$11,780.86		

- **Costs** – Displays the summary costs of various elements that make up the amount of money needed to create and run the Appeal Campaign.

Costs		
Supplier: USPS Postage		
Estimated	Actual	Quantity
\$0.00	\$500.00	1
Supplier: Resource-One		
Estimated	Actual	Quantity
\$0.00	\$700.00	1
Supplier: Resource-One		
Estimated	Actual	Quantity
\$0.00	\$400.00	10000
Notes: insert cost		
Supplier: St louis Envelope		
Estimated	Actual	Quantity
\$0.00	\$250.00	0

- **Appeal Pulls** – Displays a summary of the Appeal Pull including the Mail Date, Count, Finalized Date, Export Date, Status, Channel, and Operator for of each of the Pulls create for the Appeal.

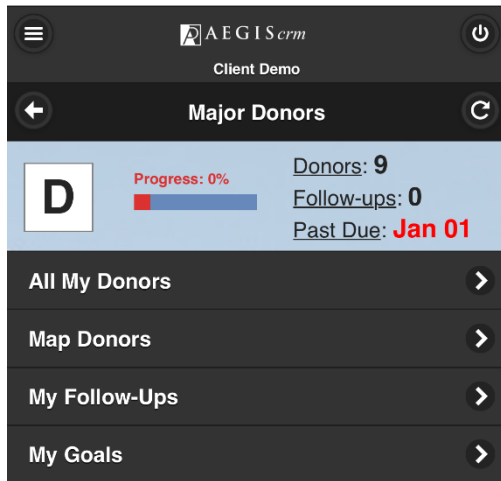
— Appeal Pulls		
MailDate	Count	
2/1/2023	10049	
FinalizedDate	ExportDate	
4/13/2023	Not Yet	
Status	Channel	Operator
Finalized	Direct Mail	Steve Veto
MailDate	Count	
11/1/2022	0	
FinalizedDate	ExportDate	
11/8/2022	Not Yet	
Status	Channel	Operator
Manual	Direct Mail	Steve Veto
MailDate	Count	
4/1/2022	9004	
FinalizedDate	ExportDate	
4/18/2022	4/13/2023	

- **Appeal Notes** – Displays information contained in the Appeal Notes field that was entered in the Aegis Desktop CRM.

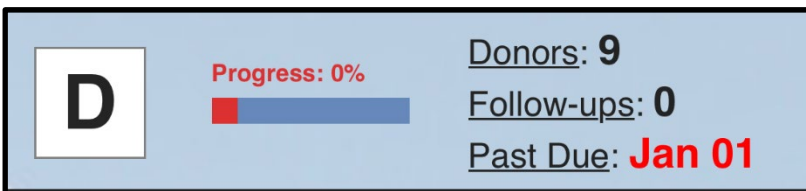
— Appeal Notes
Copy of 2016 Fall Follow-up to DCP card mailing Copy of 2016 Fall DCP card mailing

Major Donors

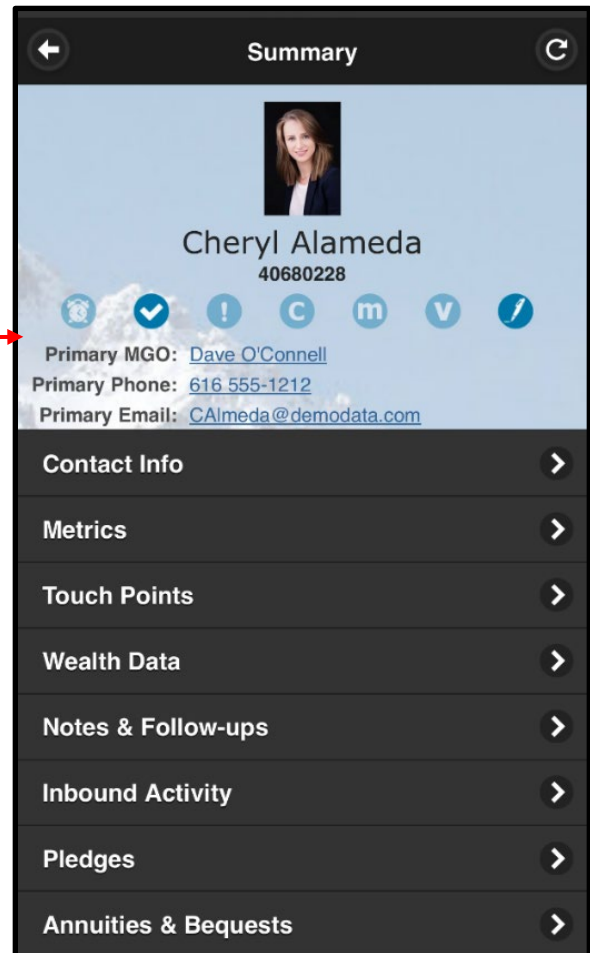
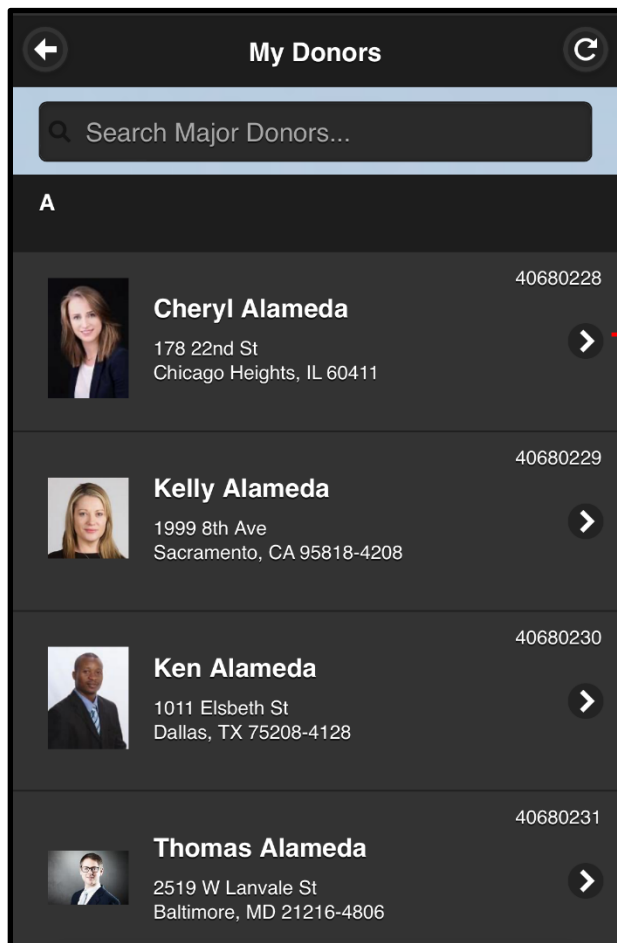
Users can view the particular Major Donor information they have been assigned from this area.



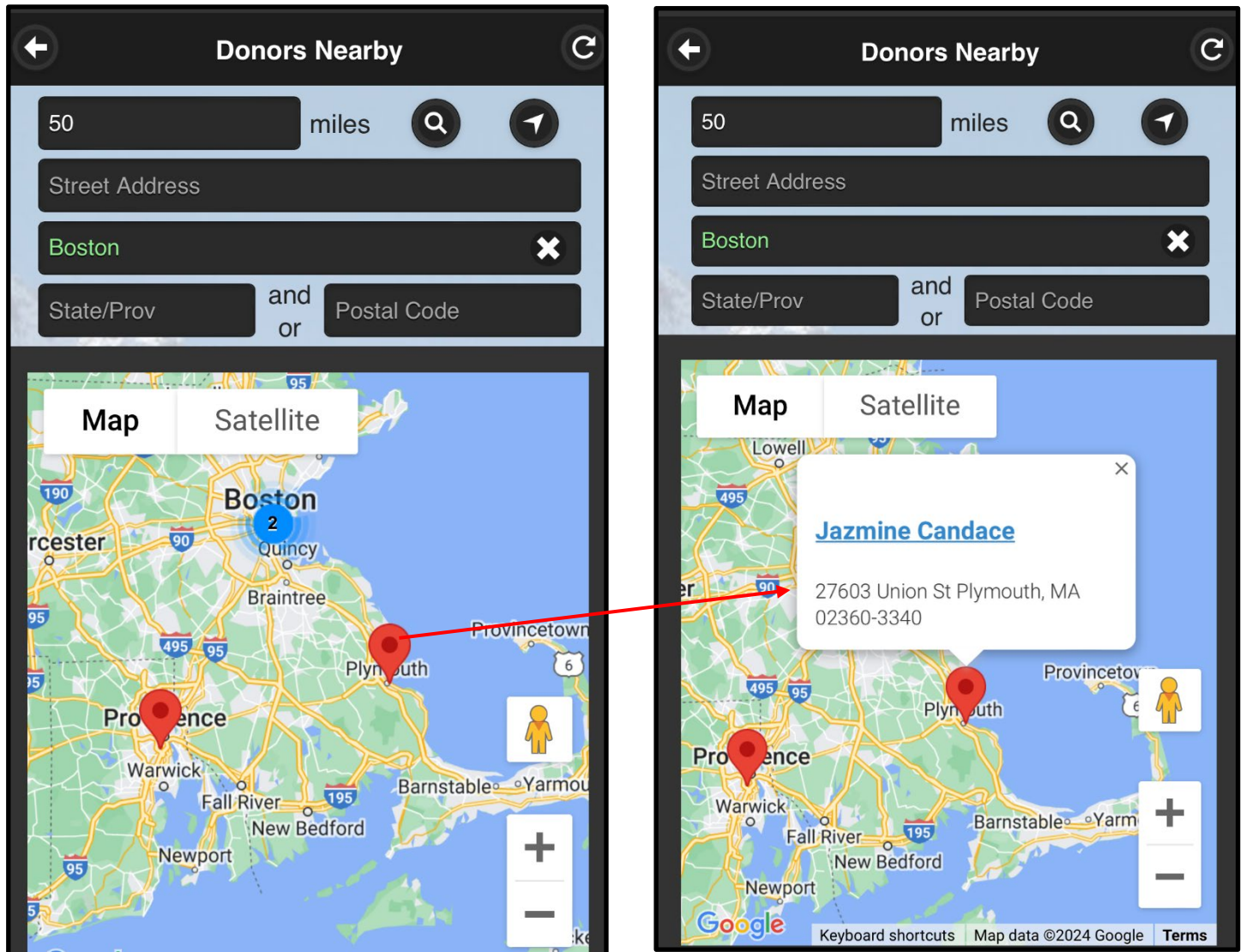
1. There are five major areas a user can view in the Major Donors mobile module:
 - **Summary information** (top of screen)
 - **All My Donors**
 - **Map Donors**
 - **My Follow-Ups**
 - **My Goals**
2. The **Summary** information lists the basic level of progress for the Major Donor that is logged in:
 - Progress towards their Goal
 - Number of Donors they are responsible for
 - Number of Follow Ups outstanding
 - Any Follow Ups that are Past Due



3. **All My Donors** section displays a list of all the Donors that the logged in user is responsible for as a Donor officer.
- Clicking on the Donor record takes you to their full record, as if you searched for and found their record under the Partners module.



4. **Map My Donors** section displays an interactive Google Maps interface where users can enter an address with a number of miles from and get a return of the Donors in that geographic location



- 5. **My Follow Ups** Displays a list of all Follow ups the user is responsible for.
- 6. **My Goals** displays an interactive display of the user's progress to date against the Calendar year for the **YTD, Totals**, with a display of **Monthly** totals as well.

